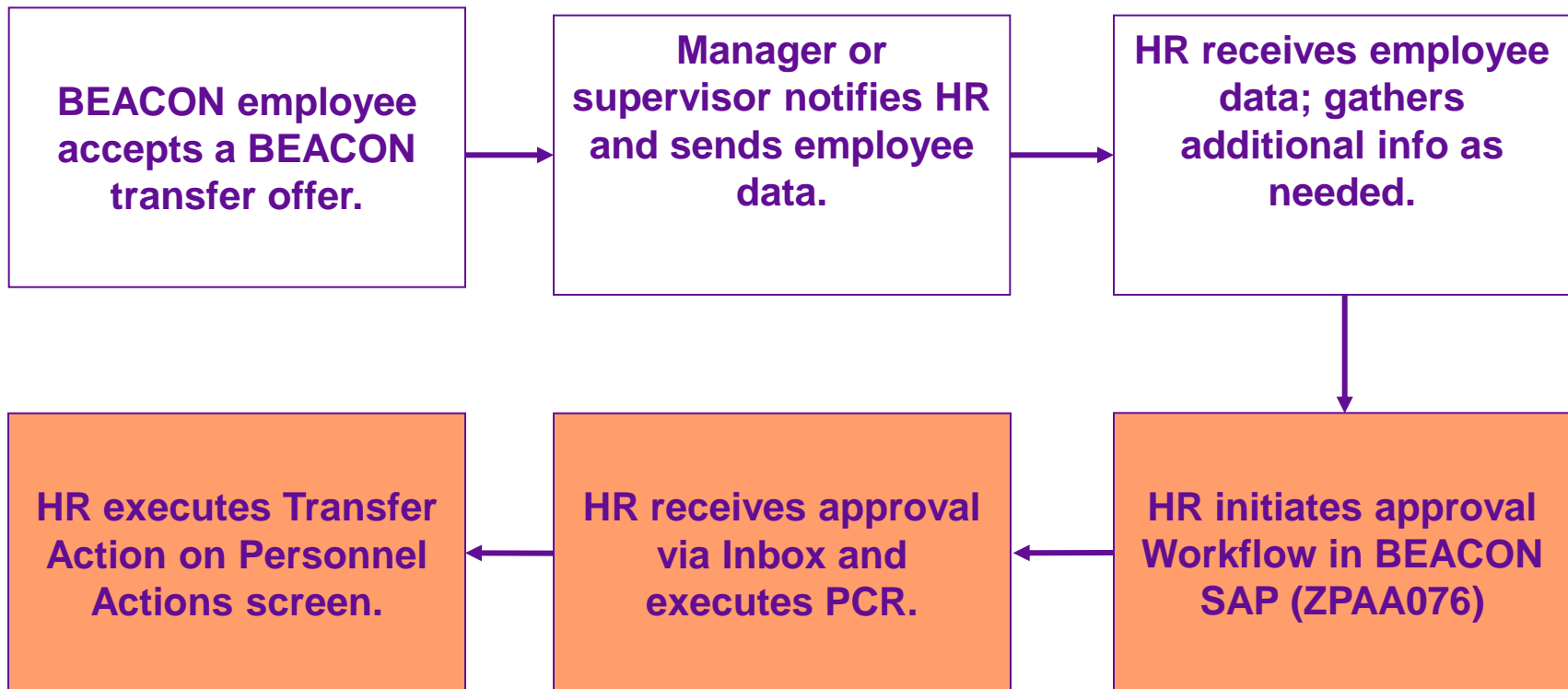


Transfers



- Transfer is the movement of an employee from one position to another within the present agency or between agencies without a break in service.
- Employee normally reports to work in the receiving agency the first workday after the last day worked at the releasing agency.
- Action is initiated by the receiving Agency (the leaving Agency does not take any steps except to delimit any items on loan the employee returned)
- Reasons (see Actions Reasons Definitions job aid at BU):
 - Agency to Agency – Lateral
 - Agency to Agency – Promotion
 - Agency to Agency – Reassignment
 - Within Agency – Lateral
 - Within Agency – Reassignment
 - Grade-Band Transfer

Transfer Overview



Exception – Change in payroll types

- If transfer results in moving an employee from monthly to weekly (or vice-versa):
 1. Agency processes the workflow as normal
 2. When approved Workflow is received in inbox, do not initiate the Action
 3. Contact BEST Shared Services and they will complete the Action
- Examples of changes in payroll types:
 - Temporary to permanent (or vice-versa)
 - A DOT employee transfers to a non-DOT Agency
 - A Temporary solutions employee to permanent

Transfer – Security for both Agencies

If you have security for both Agencies, you will complete the entire process:

- ZPAA076
 - Inbox to execute approval
 - Select Transfer from Personnel Actions screen, enter date and execute
 - Enter data on all infotypes as they appear in Action:
 - Actions, Organizational Assignment, Date Specification, Planned Working Time, Subsequent Activities*, Basic Pay, Objects on Loan
 - Complete Workflow item
- * Subsequent Activities should only be completed if the employee is transferring to a position in a different retirement system than his or her current position (for example, going from TSERS to LRORS)

Demo - Transfer Security for both Agencies

- Transfer - Within Agency – Lateral
- Helen Stephens – Office Assistant IV for CR CDS MOA Deputy Director
- Lateral to same position and salary to CR CDS MOA Educational Se
- Same salary: \$27,607
- Effective date: 6/15/2008

Transfer – No security for leaving Agency (1)

If you do not have security for both Agencies, you will initiate Workflow, enter data in part of the Action, and use PA30 to complete the Action

- ZPAA076
- Inbox to execute approval
- At Personnel Actions screen:
 - Select Transfer
 - Enter date
 - Click Execute button

(continued)

Transfer – No security for leaving Agency (2)

(continued)

- Actions infotype: Review for accuracy, Enter, and Save.
- Organizational Assignment infotype: Review for accuracy, Enter and Save.
- At the vacancy pop-ups, click Yes on both (the first is asking if a vacancy should be created on the leaving position; the second is asking if the vacancy on the receiving position should be delimited)

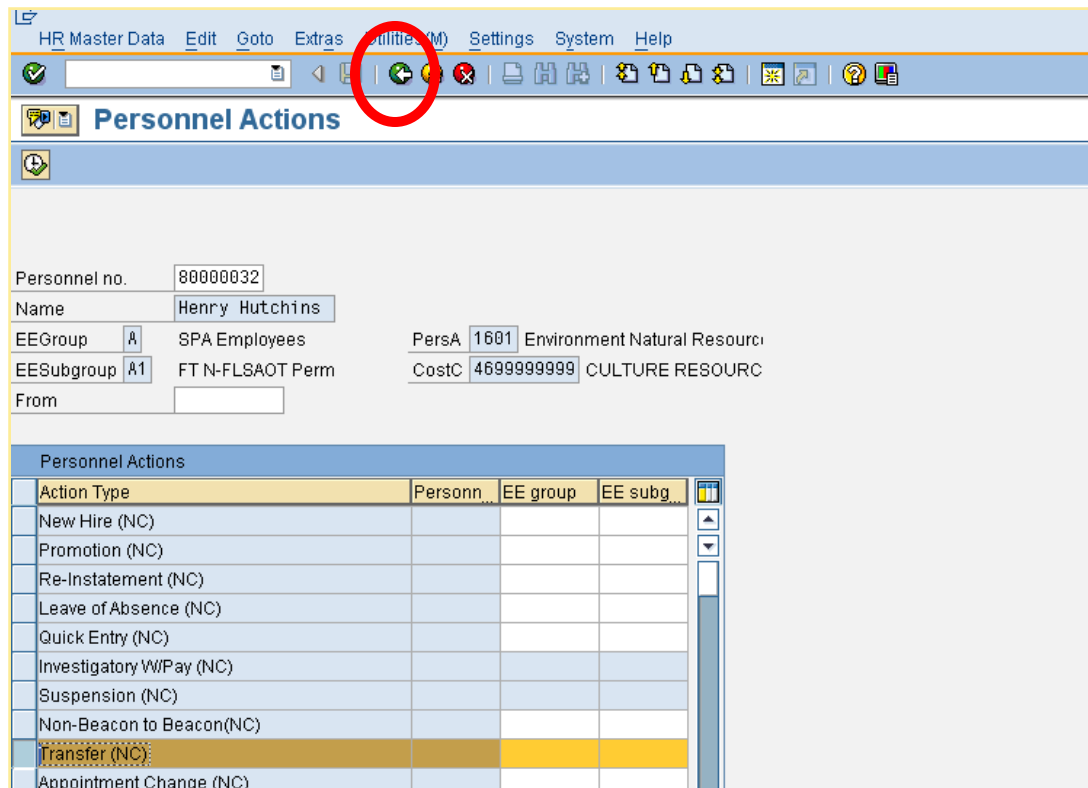
The image shows two overlapping dialog boxes from a software application. The 'Create Vacancy' dialog box is in the background, showing a title bar with a folder icon and the text 'Create Vacancy'. It contains a text field with 'S 65001417 Contracts Administrator', a date field labeled 'Create on' with the value '06/03/2008' and a calendar icon, and three buttons at the bottom: 'Yes', 'No', and 'Cancel' (with a red X icon). The 'Delimit Vacancy' dialog box is in the foreground, showing a title bar with a folder icon and the text 'Delimit Vacancy'. It contains a text field with 'S 65001502 Contracts Administrator', a date field labeled 'Delimit on' with the value '05/29/2008' and a calendar icon, and three buttons at the bottom: 'Yes', 'No', and 'Cancel' (with a red X icon).

(continued)

Transfer – No security for leaving Agency (3)

(continued)

- After you click the second “yes”, BEACON automatically returns you to the Personnel Actions screen. Click the green check to exit the Action.



HR Master Data Edit Goto Extras Utilities (M) Settings System Help

Personnel Actions

Personnel no. 80000032
Name Henry Hutchins
EEGroup A SPA Employees PersA 1601 Environment Natural Resource
EESubgroup A1 FT N-FLSAOT Perm CostC 4699999999 CULTURE RESOURC
From

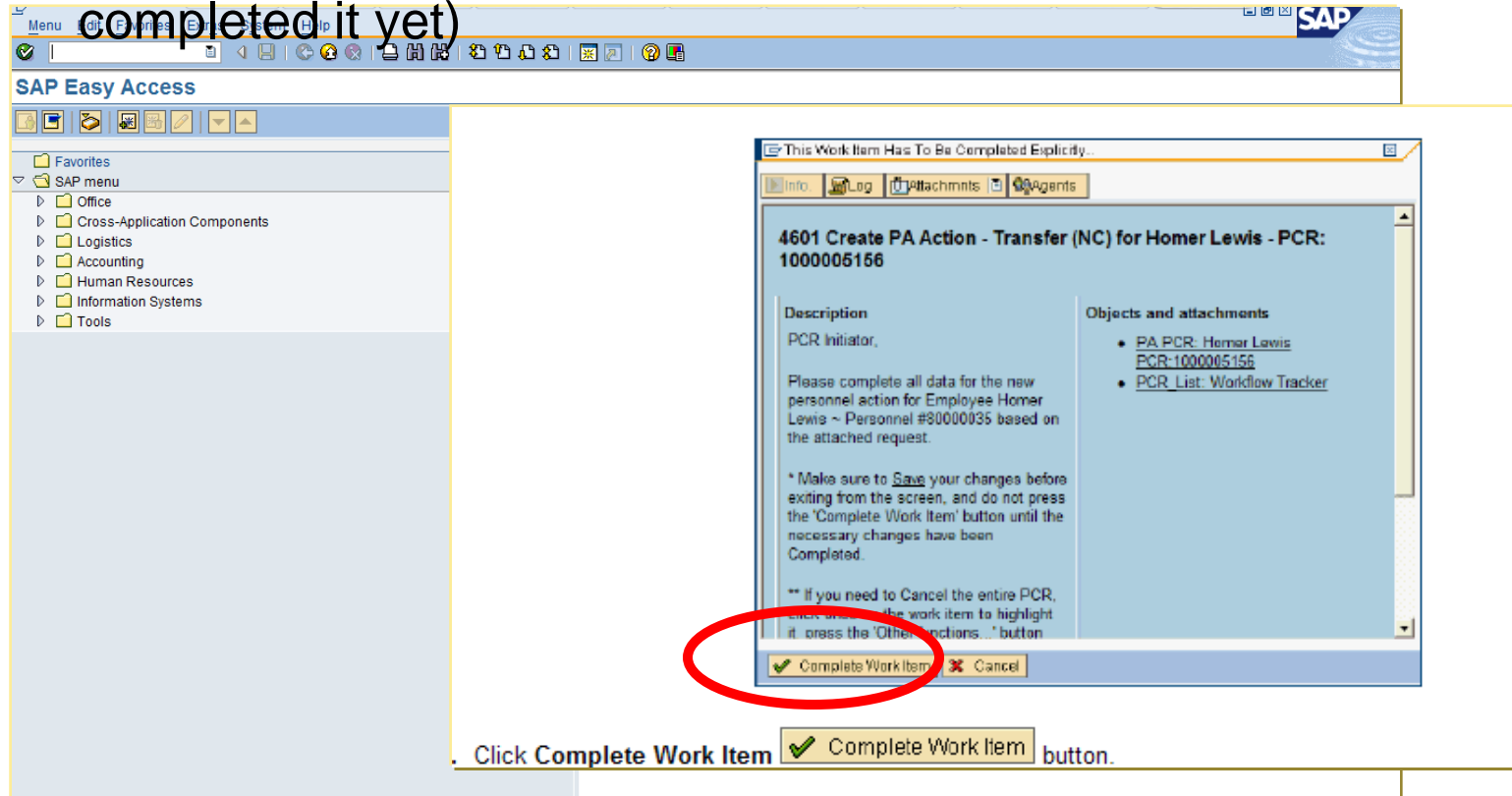
Action Type	Personn	EE group	EE subg
New Hire (NC)			
Promotion (NC)			
Re-Instatement (NC)			
Leave of Absence (NC)			
Quick Entry (NC)			
Investigatory W/Pay (NC)			
Suspension (NC)			
Non-Beacon to Beacon(NC)			
Transfer (NC)			
Appointment Change (NC)			

(continued)

Transfer – No security for leaving Agency (4)

(continued)

- Click the Complete Work Item button (even though you have not completed it yet)



- Immediately go to PA30 and complete the Action

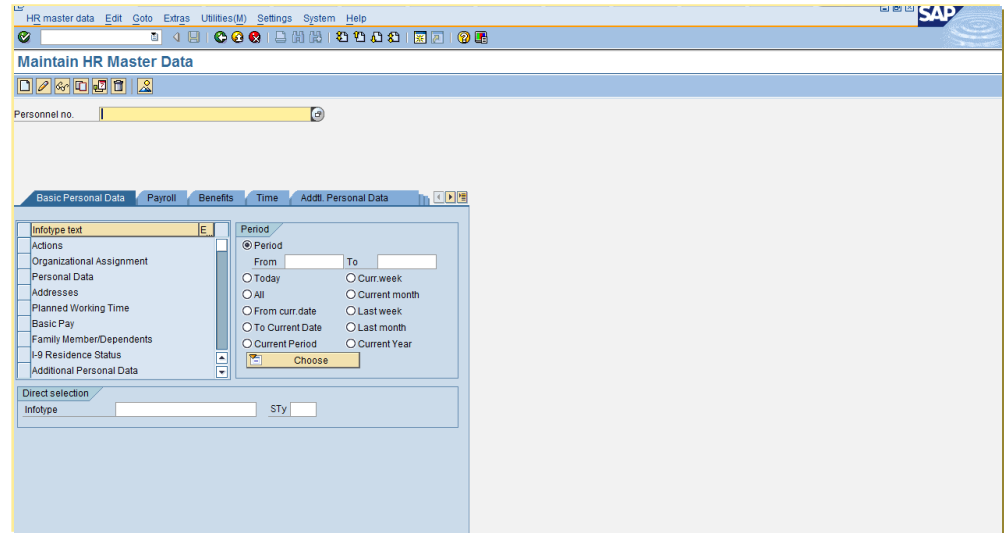
(continued)

Transfer – No security for leaving Agency (5)

(continued)

- Access PA30 to complete the Action
- Select Actions infotype
- Select All time period
- Click Overview
- Select the Transfer action
- Click the Copy icon
- Select Execute Infogroup
- Click Continue
- Save and/or enter data and save as applicable the infotypes that appear (Organizational Assignment, Date Specifications, Planned Working Time, Subsequent Activities*, Basic Pay, Objects on Loan)
- Complete Workflow Item

* Subsequent Activities should only be completed if the employee is transferring to a position in a different retirement



- Transfer - Agency to Agency – Lateral
- Rachel Bales – Contracts Administrator for ENR SO AIT Assist-Sect IT
- Lateral to same position and salary to CR CDS Archives & History
- Same salary: \$53,174
- Effective date: 6/15/2008

Assume you have already submitted Workflow.

